# Top Tips for Document Efficiencies Best Practice Guide

# Create document templates for all scenarios

Create document templates with merge fields and ensure consistency across your practice.

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	Templates	Knowledge Base Policies & Procedures Task Templates	
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Columns		Year End Checklist	Active
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		Facsimile Notice of Assessment	Active

#### **Create letterhead stationery**

Set up stationery for word documents to add your company logo, headers, footers, date, reference number, and also the sign-off and sender details.

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## Encourage users to create documents from templates

Auto-creating documents using templates save time with writing and formatting content, ensuring consistency across your practice.

Create Word		
Client	Stanley Construction Ltd client.mike.stanley@outlook.com	×
		Change Addressee
Stationery	Growth Partners - Letterhead	x   ~
Template	Tax Letter	×   ~

## Use Workflow to streamline document approval

Send documents for approval using the Workflow feature in the document drawer. This allows you to maintain document version control and a complete audit trail on document review and approval process.

Learn more about document workflows

/orkflow		
Status	Pending Approval	~
pprover	Liz Hurst	~
Owner	Mandy Jones	

Create templates using practice stationery, rich text and merge fields. For more information on Templates, visit the FYI Help Centre at support.fyi.app